



The Sales Pulse: Managing Through Activities

Sugar Sell Foundations Webinar Series

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Today's Agenda

- Why activity tracking matters
- Calls, Meetings, Notes, Tasks, Emails, and Messages in Sugar
- Activity tracking best practices
- Using Sugar Connect
- One-click activity tracking
- Dashboards, reports & coaching
- Q&A

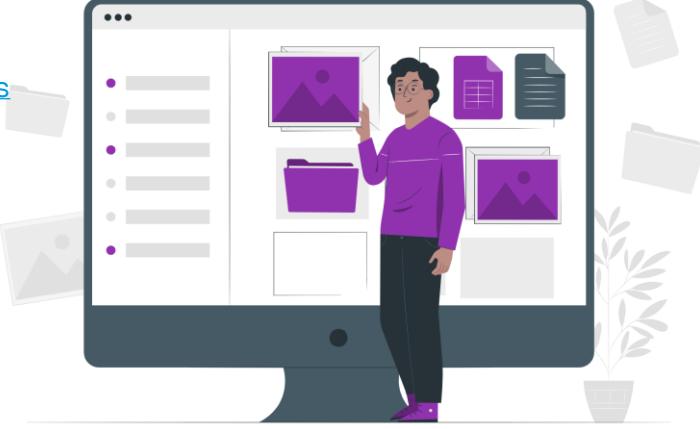
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Resources

[Sugar Application Guide > Calls](#)
[Sugar Application Guide > Meetings](#)
[Sugar Application Guide > Notes](#)
[Sugar Application Guide > Tasks](#)
[Sugar Connect User Guide](#)
[SugarLive Message Records](#)



[SugarLive User Guide](#)
[Calendar](#)
[Creating Action Buttons](#)
[Last Interaction Field](#)

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Why Activity Tracking Matters

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Why Activities Matters

Activities = Engagement. Movement. Momentum.

- Show customer interaction history
- Enable meaningful coaching
- Improve forecasting accuracy
- Prevent follow-up gaps
- Drive deal progression

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What Happens Without Activity Tracking



No visibility into rep effort



Missed follow-ups



Inaccurate pipeline assumptions

Coaching becomes guesswork



Deals slow or stall



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Calls, Meetings, Notes, Tasks, Emails, and Messages in Sugar



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Sugar Activity Types



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Calls: When & Why

Use **Calls** for:

- Phone conversations
- Call attempts or voicemails
- Scheduled or completed calls

Key fields:

- Direction
- Status
- Internal Notes
- Guest

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Meetings: When & Why

Use **Meetings** for:

- Scheduled demos
- Discovery sessions
- Zoom/Teams calls
- Any interaction requiring a date/time

Key fields:

- Repeat Type
- Location
- Internal Notes
- Guest

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Notes: When & Why

Use **Notes** for:

- Information that doesn't have a due date
- Important info about the related record (like a contact) that's not a call or meeting

Key fields:

- Description
- Attachment

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Task: When & Why

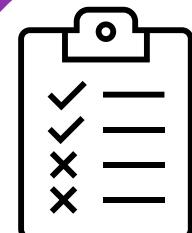
Use **Tasks** for:

- Follow-ups
- To-dos that aren't meetings/calls
- Internal reminders or to-do's

Key fields:

- Start and End Dates
- Status
- Priority
- Description

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Email Tracking (via Sugar Connect)

Use **Sugar Connect Email Tracking** for:

- Automatically capture inbound/outbound emails
- Link emails to Leads, Contacts, Accounts, Opportunities
- No manual data entry required

Other Options:

- Sugar Email Client
- External Email
- Clients
- Composing and Sending Outbound Emails
- Email Campaigns
- Email Templates
- Integration with DocuSign

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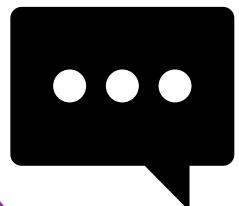
Messages: When & Why

Use **Messages** for:

- For customers using SugarLive
- Represent historical records of instant messaging chat
- New message record containing the chat transcript.

Key fields:

- Related to (flex-rate field type - module and record that is related to this message)
- Guests (participants in the conversation)
- Conversation (transcript)



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Using Tracking Best Practices

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Decision Guide: What Should I Log?

Interaction	Type of Record
Phone interaction?	Log or schedule a Call
Gathering Group of People Discussion (Virtual or In-Person)	Create a Meeting
Attach a file or additional information to a record in Sugar	Create a Note
Follow-up needed?	Create a Task
Email sent/received?	Logged via Connect
Use SugarLive Chat to communicate with clients?	A Message Record is automatically created

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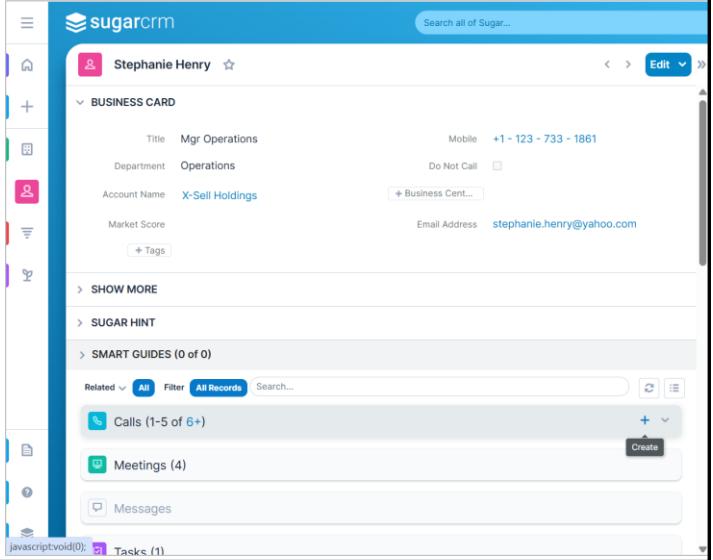


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Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels



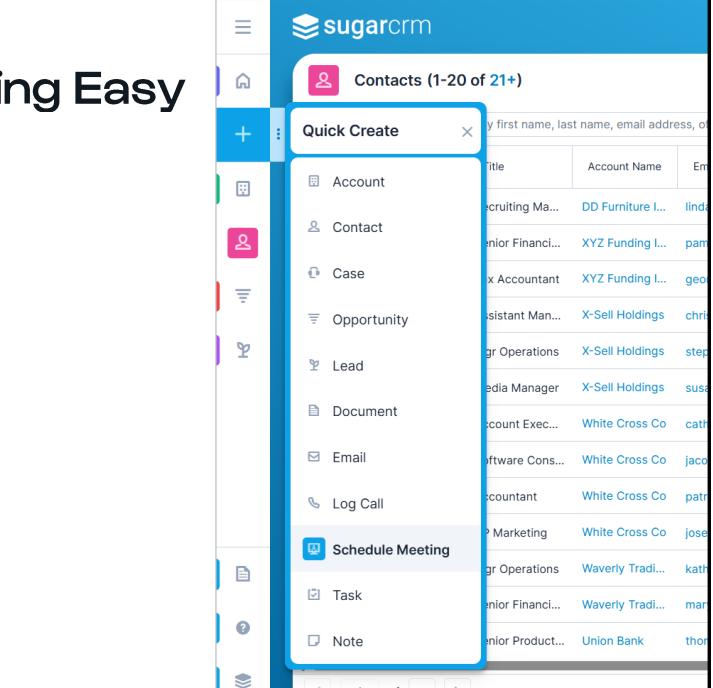
The screenshot shows a SugarCRM contact record for 'Stephanie Henry'. The 'Related' subpanel is open, showing activity logs for 'Calls (1-5 of 6+)', 'Meetings (4)', and 'Messages'. A link to 'Tasks (1)' is visible at the bottom of the subpanel.

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Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels
- Quick Create



The screenshot shows the 'Quick Create' modal in the SugarCRM interface. The 'Contact' option is highlighted with a blue box. Other options listed include Account, Case, Opportunity, Lead, Document, Email, Log Call, Schedule Meeting, Task, and Note.

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Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels
- Quick Create
- **Timeline** view

Linda Holiday

Contacts Focus Dashboard

Linda Holiday

Title: Recruiting Manager
Mobile: +1 - 925 - 277 - 6866
Department: Human Resources
Business Center Name: NA Business Center
Market Score: No data
Email Address: linda.holiday@yahoo.com

DD Furniture Inc

Website: <http://www.ddfurnitureinc.com> Industry: Transportation
Member of: Type: Customer
Business Center Name: NA Business Center Service Level: Tier 1
Assigned to: Office Phone: +1 - 707 - 555 - 2061

Timeline

- Schedule training (Sunday, 06/25/2026 07:15)
- Confirm next onsite meeting (Inbound, Thursday, 06/25/2026 12:00 - 12:30 (30 minutes))
- Workshop with a Sales Engineer (Wednesday, 06/26/2026 10:00 - 11:00)

Purchase History

Order	Product	Quantity	Total
1	DD Furniture Inc - \$4570 - New - 900.000000	447	\$-664,761.89
2	DD Furniture Inc - \$1436 - New - 800.000000	225	\$-189,016.67

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Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels
- Quick Create
- Timeline view
- **Action Buttons**

Justin Johnston

Unconverted

Initial Call **Initial Call** **Edit**

BUSINESS CARD

Title: President
Website: <http://www.otcholdings.com>
Account Name: OTC Holdings
Market Score
Primary Address
Alternate Address

Lead Action Buttons

Initial Call **+ Demo Meeting** **First Intro Email**

SHOW MORE

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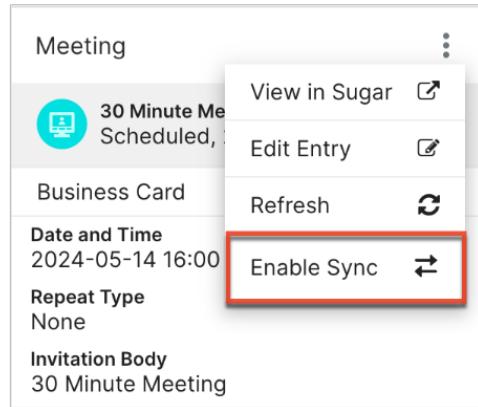
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Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels
- Quick Create
- Timeline view
- Action Buttons
- **Sugar Connect** syncing



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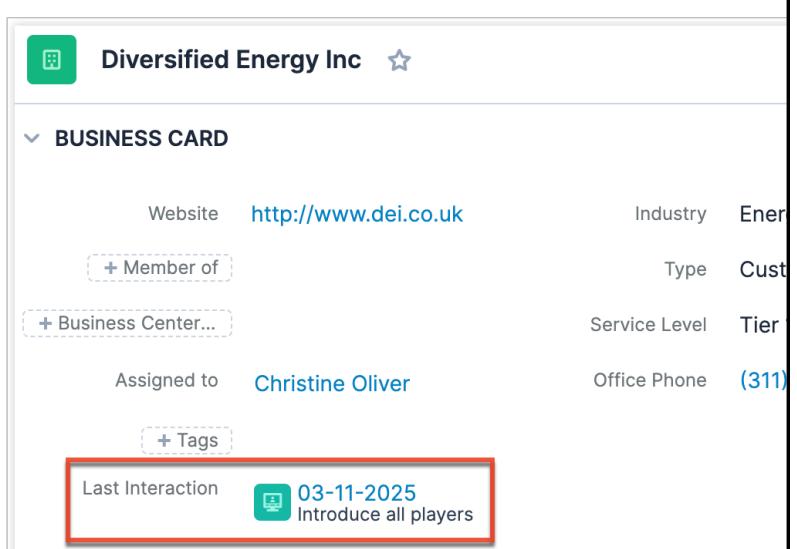
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Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels
- Quick Create
- Timeline view
- Action Buttons
- Sugar Connect syncing
- **Last Interaction** field on account records



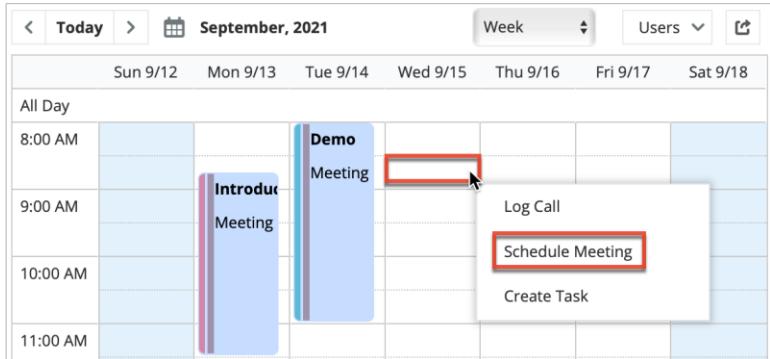
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Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels
- Quick Create
- Timeline view
- Action Buttons
- Sugar Connect syncing
- Last Interaction field on account records
- **Calendar**



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Suggested Calendar Admin Quick Setup

- Create a role [Admin>Role Management]
 - Set the **Calendar** Module permissions to :
 - Access: Enabled
 - Access Type: Normal
 - Edit & Delete: Owner
 - List & Record View: All

Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	Record View
Enabled	Normal	Not Set	Owner	Owner	Not Set	All	Not Set	All

- Add all calendar users to this role in Users panel

Results: Users can view team calendars but **only** edit or delete their own calendar

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One-click Activity Tracking

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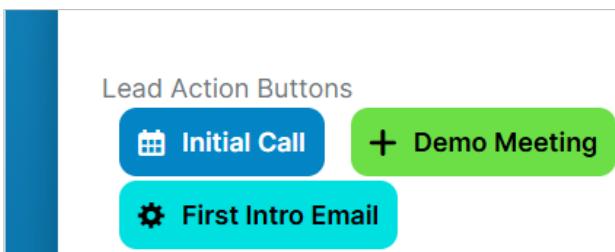
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Action Buttons for 1-click Logging

Examples:

- “Log a Call”
- “Schedule Follow-Up”
- Auto-populated activity records

Benefits: Fast · Consistent · Accurate



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Working in Sugar: Best Practices

- Log activities in context using subpanels
- Use Quick Create for speed
- Review Timeline before reaching out
- Keep outcomes & purpose fields updated

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Sugar Connect: Calendar & Email Sync

- Sync meetings from Outlook/Gmail
- Log emails to Sugar directly from inbox
- Add new Contacts/Leads from email
- Auto-capture meeting invites & reminders

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Daily “Workflow” Example

1. Receive email from prospect → auto-logged
2. Schedule discovery call → synced Meeting
3. Hold call → log Call outcome
4. Create Task for follow-up
5. Manager reviews activity history in dashboard

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Dashboards, Reports, & Coaching

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Dashlets on Dashboards for Reps

- My Activities
- Upcoming Meetings/Calls
- Recent Communications
- Opportunity with no Next Steps

The screenshot shows the SugarCRM My To-Do Dashboard. It includes several dashlets:

- Active Tasks:** Shows 5 Due Now, 10+ Upcoming, and 0 To Do. Examples include "Arrange reference call" and "Setup evaluation", both marked as Overdue.
- Planned Activities:** Shows 3 Meetings and 5 Calls. Examples include "Workshop w/ a Sales Engineer" and "Meet with the Sales Executive", both marked as Overdue.
- My New & Assigned Leads:** A table with columns Name, Status, and Account Name. Entries include Don James (New, TK Pickers), Todd Johnston (New, Fireworks LLC), Elon Musk (New), Jeff Bezos (New), and Zac Sprackett (New).
- My Open Opportunities with NO Next Steps:** A table with columns Name, Account Name, and Expected Close Date. Entries include First National S/B (\$1956 - New - 300 Units, 02/13/2026), RRR Advertising Inc. (\$6653 - New - 298 Units, 10/19/2027), Grow-Fast Inc. (\$1195 - New - 212 Units, 10/19/2026), Waverly Trading House (\$2872 - New - 231 Units, 08/10/2026), and QRE Corp. (\$4787 - New - 121 Units, 12/09/2026).
- History:** Shows 6 Meetings, 10+ Emails, and 7 Calls from the last 7 days. Examples include "Discuss business requirements" and "Meet with the Sales Executive".

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Dashboards for Managers: What to Look for

🔍 Activity Gaps

Opportunities with little or no recent engagement

🕒 Aging Activities

Long gaps between customer interactions

⌚ Follow-Up Discipline

Clear next steps after calls and meetings

⚖️ Activity Balance

Healthy mix of Calls, Meetings, Emails and Tasks

📈 Activity → Pipeline Movement

Engagement that drives stage progression

Key mindset: Look for patterns—not just volume

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Reports for Operational Insight

- Calls by Outcome (Connected – Productive, Connected – Not Interested, Left Voicemail, No Answer, Follow-Up Scheduled, Demo Booked, Disqualified)
- Meetings by Type (Live, Sugar, Teams, Zoom)
- Weekly Activity Summary by Rep
- Activity → Pipeline movement
 - In Sugar, this is often built by:
 - Linking **Activities** → **Opportunities**
 - Tracking **stage change date**
 - Using **Activity Outcome** as a grouping dimension
 - Optionally layering **SugarBPM** triggers for “stage advanced within X days of activity”

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Embedding Activities Into Coaching

- Review patterns in weekly 1:1s
- Discuss quality of conversations
- Assess follow-up discipline
- Identify skill gaps

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Key Takeaways and Q&A

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Key Takeaways

- Activities drive **visibility & accountability**
- Calls, Meetings, Notes, Tasks, Emails, and Messages each serve distinct **roles**
- Sugar Connect **eliminates manual steps**
- Action Buttons make **tracking effortless**
- Dashboards & reports **operationalize the process**

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Questions?

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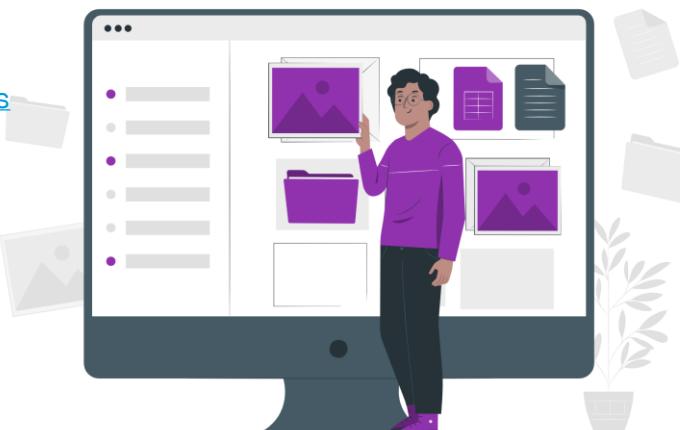


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Next in Series

[**Jan 13: Sugar on the Go: Mobile Selling Made Easy**](#)

[**Jan 20: Less Busywork, More Selling - Automating Your Sugar Workflows**](#)

[**Jan 27: Sales Mastery: Driving Growth with Sugar**](#)



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Thanks for attending.

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